



BRIDGER

Policy Administration System Training Manual

Please contact *Broker Relations* with any questions on how to use the system:

Phone #: (925) 800-7442

E-Mail: BrokerRelations@BridgerIns.com



BRIDGER

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BRIDGER

How to Log Into the Bridger Policy Administration System



BRIDGER

Go to the Bridger Website at <https://Producer.BridgerIns.com>

Input your **Login Credentials** and Click **SIGN IN** – Once logged into the system, it is best to remain logged in

USER NAME

PASSWORD

SIGN IN



BRIDGER

How to Issue a New Policy



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DRIVERS SCREEN

Make sure that each field with the **Red*** is completed.

If the insured needs an **SR-22 Filing**, make certain to check the **SR-22 Box**.

****Do NOT** check the box if an **SR-22** is not needed. **SR-22's** are usually required when the driver has had a DUI offense**

Ask the customer if there are any other members of the household, age **15** or older, and if they wish to **ADD** or **EXCLUDE** them from the policy.

These household members MUST be either Added or Excluded from the policy.

If no other drivers need to be listed and all information has been entered, click the **NEXT** button at the bottom right side of the screen.

DRIVERS

+ ADD DRIVER

1 of 1

Rated or Excluded *

Rated

Reason Excluded

N/A

First Name *

STEVE

Middle Initial

Last Name *

MORENO

Gender *

Male

Marital Status *

Married

Date of Birth *

10/30/1969

Relationship to Named Insured *

INSURED

License Information

Current License State *

California

Current License Number *

A1234567

License Status *

Active

Current US License Years/Months *

34

6

Total US License Years/Months *

34

6

International Years/Months

0

0

SR22

☐

Employer / Occupation Information

Occupation

Engineer

Employer/School Name

BRAVO

Street Address

111 TACO ST

City

LOS ANGELES

State, Zip:

California

90048

SAVE & EXIT

← BACK

NEXT →



BRIDGER

DRIVERS SCREEN

Adding Additional Driver(s) to the policy or Excluding Individual(s) that will **NOT** be covered under this policy:

Click the **+ ADD DRIVER** button and additional fields will appear.

Complete each field with the **Red*** just as you did for the named insured.

The system will Default to “**Rated Driver**” in the first field. If the individual needs to be **Excluded as a Driver**, select **Excluded** in the drop-down field.

When all other **Drivers** and **Household Members** age **15** and older have been **Added or Excluded**, click the **NEXT** button at the bottom of the screen.

RATED

DRIVERS				
+ ADD DRIVER		1 of 2	DELETE DRIVER	2 of 2
Rated or Excluded *	Rated		Rated	
Reason Excluded	N/A		N/A	
First Name *	STEVE		DENISE	
Middle Initial				
Last Name *	MORENO		MORENO	
Gender *	Male		Female	
Marital Status *	Married		Married	
Date of Birth *	10/30/1969		01/01/1972	
Relationship to Named Insured *	INSURED		Spouse	

EXCLUDED

DRIVERS				
+ ADD DRIVER		1 of 2	DELETE DRIVER	2 of 2
Rated or Excluded *	Rated		Excluded	
Reason Excluded	N/A		Not Licensed & Doesn't Drive	
First Name *	STEVE		DENISE	
Middle Initial				
Last Name *	MORENO		MORENO	
Gender *	Male		Female	
Marital Status *	Married		Married	
Date of Birth *	10/30/1969		01/01/1972	
Relationship to Named Insured *	INSURED		Spouse	

SAVE & EXIT	← BACK	NEXT →
-------------	--------	--------



BRIDGER

VIOLATIONS SCREEN

Ask the customer if they have had any **Accidents or Moving Violations** in the past **36 Months** or any **Major Violations** in the past **7 Years**.

If **YES**, Click the **+** icon and an **Add Violation Pop-Up Box** will appear. Choose the **Incident Code** from the drop down, input the **Violation Date** and click the **SAVE** button.

If you need to **Delete** or **Edit** a **Violation** or **Accident**, click on the **Delete** or **Edit** icons.

After inputting all the **Driving Activity**, click the **NEXT** tab on the right side of the screen.

If no **Driving Activity** needs to be entered, just click the **NEXT** button on the right side of the screen.

If NO Violations/Accidents

If YES to Violations/Accidents



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VEHICLES SCREEN

Make sure all fields with the **Red*** are complete.

If there is no **Lienholder** or **Additional Insured** on the vehicle, select **None** in the drop-down field.

If the vehicle is financed, select **Lienholder** in the drop down

If a vehicle is leased, be sure to select **BOTH** in the **Lienholder or Additional Insured** drop-down field.

If only one vehicle is desired, click on the **NEXT** button on the bottom right side of screen.

If Additional Vehicles need to be added, see next page.

VEHICLES

[+ ADD VEHICLE](#) [DELETE VEHICLE](#) 1 of 1

SEARCH BY VIN

Year: * 2012

Make: * Buick

Model: * ENCLAVE

MSRP / Cost New: 37000

Vin (17 Digits): 5GA&RDED&C ⓘ

Vehicle Use

Use: * Business

Estimated Annual Distance: * 12000

Primary Driver: Steve moreno

Garaging Zipcode: * 90024

Purchase

Date Vehicle Purchased: 01/01/2012

Purchased New / Used: New - Original Owner

Lienholder/Lessor Information

Name: GMAC

Street Address: 35 PARK AVE

City: NEW YORK

State, Zipcode: New York 10136



Account / Ref Number:

Lienholder or Addl Insured: Both

SAVE & EXIT

← BACK

NEXT →





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VEHICLES SCREEN

Adding Additional Vehicles:

If more vehicles are desired, please select the **ADD VEHICLE** button.

If you wish to remove a vehicle, please select the **DELETE VEHICLE** button.

Once you've selected **ADD VEHICLE**, the **Vehicle Screen** will appear.

Enter all required information where there is a **Red*** for each additional vehicle added to the policy.

After all additional vehicles have been added or removed, click the **NEXT** button.

ADD / DELETE VEHICLE

VEHICLES

+ ADD VEHICLE DELETE VEHICLE 1 of 1

VEHICLES

+ ADD VEHICLE DELETE VEHICLE 1 of 2

SEARCH BY VIN

Year: * 2012

Make: * Buick

Model: * ENCLAVE

MSRP / Cost New: 37000

Vin (17 Digits): 5GA&RDED&C

Vehicle Use

Use: * Business

Estimated Annual Distance: * 12000

Primary Driver: Steve moreno

Garaging Zipcode: * 90024

SAVE & EXIT BACK NEXT

Complete all fields
for additional vehicles



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LIMITS SCREEN

Confirm the desired Coverages in the drop-down screens for: **BI, PD, MED, UMBI, UMPD/CDW, OTHER THAN COLLISION** and **COLLISION**

After the all Coverage selections have been made, click **RATE AND NEXT** button.

Limits	Policy Limits	2012/Buick/ENCLAVE
BI: *	\$15,000/\$30,000	Select <u>BI Limit</u>
PD: *	\$10,000	<u>PD Limit</u>
MEDPM:	\$500	MED, UMBI, UMPD/CDW, Other than Collision and Collision Drop down fields must have Coverage or None selected. The system will notify you if drop-downs have not been properly selected when you Click RATE AND NEXT
UMBI:	\$15,000/\$30,000	
UMPD/CDW:	\$3,500 or CDW	
Other than Collision:		
Collision:		\$1,000
Optional Selections		
Lessor Liability		<input checked="" type="checkbox"/>

Limits	Policy Limits	2015/Ford/EDGE
BI: *	\$15,000/\$30,000	
PD: *	\$5,000	
MEDPM:	None	
UMBI:	None	
UMPD/CDW:	None	
Other than Collision:		None
Collision:		None

← BACK SAVE RATE AND NEXT →



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QUOTE SCREEN

1. Review the **Payment Options** with the customer and select the desired **Pay Plan**.
2. Confirm the **Coverage, Premium** and **Pay Plan** with the customer, then click **NEXT**.

Available Payment Options

<input type="radio"/> Payment Method	Down	Installment	Total
<input type="radio"/> 18% down, 5 pay EFT	\$187.22	\$144.73	\$910.88
<input type="radio"/> 18% down, 5 pay EFT CC	\$187.22	\$144.73	\$910.88
<input checked="" type="radio"/> 18% down, 5 pay installment	<u>\$187.22</u>	<u>\$146.73</u>	<u>\$920.88</u>
<input type="radio"/> 25% down, 5 pay EFT	\$242.88	\$133.60	\$910.88
<input type="radio"/> 25% down, 5 pay EFT CC	\$242.88	\$133.60	\$910.88
<input type="radio"/> 25% down, 5 pay installment	\$242.88	\$135.60	\$920.88
<input type="radio"/> Pay in Full	\$860.88	N/A	\$860.88

Rate		
Coverages	Policy Limits	Jeep/2017
BI	\$15,000/\$30,000	\$136.00
PD	\$5,000	\$198.00
MEDPM	\$500	\$39.00
UMBI	\$15,000/\$30,000	\$69.00
UMPD/CDW	\$3,500 or CDW	\$3.00
Other than Collision		\$3500 Ded-w/Class \$75.00
Collision		\$3500 Ded \$227.00
Glass Deductible Waiver		Unincluded \$37.00
Vehicles Total		\$784.00
Policy Total		\$784.00
Fraud Fee		\$0.88
Policy Fee		\$40.00
Total Premium and Fees		\$824.88
Nation Safe Driver		\$36.00
Total Premium		\$860.88
Discounts and Surcharges		
Conviction Free Discount		
Good Driver		YES



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BINDING SCREEN

- 1) Select **In Office eSign** box if the customer is in your office
 - 2) Select the **Remote eSign** box if the sale is being completed over the phone
- IMPORTANT:** You must input the Insured Email Address to send the application to the customer for remote signatures

BINDINGSAVE & EXITPURCHASE & CONTINUE TO ESIGN← BACK

Application Print / Sign Options

Select One	Description
<input type="checkbox"/> In Office eSign	Producer Has Customer eSign Application In Office
<input checked="" type="checkbox"/> Remote eSign	Producer Has Customer eSign NOT In Office (Insured email Required)

Insured Email

TEST@GMAIL.COM





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BINDING SCREEN

2. Confirm the requested **Effective Date** of the policy.
3. Read the "**I Agree**" statement to the customer.

Once the customer agrees to the statement, check the "**I AGREE**" box.



Requested Effective Date	
Effective Date	I Agree <input type="checkbox"/> By checking this box, I confirm that the effective date entered is correct. I also understand and agree that once this transaction is submitted and purchased, a policy is issued and cannot be voided or flat cancelled. If policy is to be cancelled, regardless of reason, policy fees are fully earned and will not be returned.
09/08/2020	



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BINDING SCREEN

4. Select the **Race/Origin** of the customer in the drop-down field.

If the customer does not wish to provide, select **“Not Provided by Applicant”**



Race/Origin Report	
Applicant	
Latino	▼



Race/Origin Report	
Applicant	
Not provided by applicant	▼



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BINDING SCREEN


5. Read the **MVR Statement** to the customer and confirm the customer has agreed to running the **MVRs**.
6. Click the **PURCHASE & CONTINUE TO ESIGN** button.


MVR Report

☒ Verify you have advised the insured that we are about to run their MVR

READ THIS TO THE CUSTOMER: uses information from you and other sources, such as your Motor Vehicle Report to calculate your insurance price. BRAVO will update this information at each renewal. BRAVO Privacy Policy explains how BRAVO discloses and protects your personal information and how you may access and correct it. I can provide you with a copy. May we order your MVR report now in order to give you a more accurate quote?

 SAVE & EXIT

 PURCHASE & CONTINUE TO ESIGN

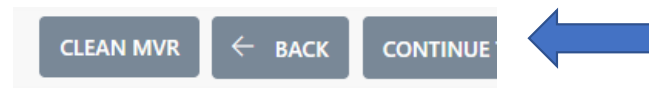
 BACK



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MVR SCREEN

The system has now run a **Motor Vehicle Report (MVR)** and **Underwriting Report(s)**.
If the reported **Driving Activity** matches the **MVR/Underwriting Report(s)** activity, click the **CONTINUE** button.



If there is any **Driving Activity** that was not disclosed by the customer, that undisclosed information will appear on the screen.
The screen will display any undisclosed Violations or Accidents and the Date of those incidents.

Violation/Conviction Code	Violation Date	Conviction Date
No accident		
Driving activity and violation date will appear here		
Suspensions/Revocations	Start Date	Clear/End Date
No suspension		

Click the **CONTINUE TO RE-RATE RISK** Button. The system will re-rate the premium based on the newly identified driving activity.





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QUOTE SCREEN

The system will bring you back to the **Quote Screen** and display the revised **Premium** based on the undisclosed **Driving Activity**.

Review the new **Premium** with the customer, and ask them if they wish to continue.

If **YES**, click the **NEXT** button.

If **NO**, click **SAVE & EXIT** button to exit the quote process.

This will save the quote for quick reference should the customer decide to come back and purchase the policy.

Available Companies			Available Payment Options			
Company Name	Term	Premium	Payment Method	Down	Installment	Total
<input checked="" type="radio"/> Incline National Insurance Company	6 ▼	\$320.88	<input type="radio"/> 16.66% Down-5 Installment	\$80.86	\$48.00	\$320.88
			<input checked="" type="radio"/> 16.66% Down-5 Installments EFT	\$80.86	\$48.00	\$320.88
			<input type="radio"/> 16.66% Down-5 Installments EFT CC	\$80.86	\$48.00	\$320.88
			<input type="radio"/> Pay in Full	\$320.88	N/A	\$320.88

Rate		
Coverages	Policy Limits	Ford/2015
BI	\$15,000/\$30,000	\$147.00
PD	\$5,000	\$141.00
Vehicles Total		\$288.00
Policy Total		\$288.00
Fraud Fee		\$0.88
Policy Fee		\$32.00
Total Premium and Fees		\$320.88
Total Premium		\$320.88

If **NO**

If **YES**

PRINT QUOTE SAVE & EXIT BACK NEXT



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BINDING SCREEN

The system has now taken you to the **Binding Screen** once again.


The fields will be populated with the information you provided previously.

Make sure all boxes are checked and the information displayed is correct.

Click the **PURCHASE & CONTINUE TO ESIGN** button.

 **SAVE & EXIT**

 **PURCHASE & CONTINUE TO ESIGN**

 **BACK**





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IN OFFICE eSIGN

The customer is in the office and present.

- Select the **In Office eSign** check box.
- Click "**I Agree**" check box.
- Select the **Race/Origin** In drop-down field.
- Ask customer all **Application Questions** and select answer in drop-down fields.
- Check the **MVR Report Box** and read statement to customer.
- Select the **PURCHASE & CONTINUE TO ESIGN** button



Select One	Description
<input type="checkbox"/> Producer Print	Application Prints At Producers Office For Customer To Sign (wet signature)
<input checked="" type="checkbox"/> In Office eSign	Producer Has Customer eSign Application In Office
<input type="checkbox"/> Remote eSign	Producer Has Customer eSign NOT In Office (Insured email Required)



I Agree ☐ By checking this box
policy is issued and cannot be v



Race/Origin Report

Applicant

Please select



Application Questions

You agree that this is a named driver only policy and only driver listed on the application will be covered for physical damage coverage (Comprehensive & Collision)

Are there any vehicles registered to this Applicant which are not listed on this application?

Are there any other drivers living in the household not listed on this application?

Have any of the vehicles on this application ever been damaged or declared a total loss?

Yes No Yes No Yes No



MVR Report

☒ Verify you have advised the insured that we are about to run their MVR

READ THIS TO THE CUSTOMER: BRAVO uses information from you and other sources to help us understand your risk. We explain how BRAVO discloses and protects your personal information and how

PURCHASE & CONTINUE TO ESIGN



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IN OFFICE eSIGN

The customer is in the office and present.

Final Screen Before Purchase

- Review the **Summary of Coverages, Premium** and **Pay-Plan** with the customer.
- Complete the **Authentication Process** by checking the boxes, **Application Security Questions**, and input **Producer Name** in required fields.
- Select the **Down Payment Method** (*Insured Credit Card / Bank Account or Producer Sweep of Trust Account*).
- Check in the **Installments** box.
- Check the **Commercial and Professional Business Exclusion** box.
- Select **YES** or **NO** for the **Electronic Billing and Document Delivery** check-box.
- Select **YES** or **NO** for the **Text Message Notifications** check-box.
- Check the **Bill of Rights Form** check-box.
- **Producer** must check all required boxes and type in your **Name** where requested.
- Click **Purchase** to complete the policy issuance process and to receive **Policy Documents**.

Purchase

Cancel this eSignature Session



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REMOTE eSIGN

The customer is **NOT** present in the office.

Transaction is being completed remotely by telephone, and customer is **NOT** present.

Final Screen Before Purchase

- Select the **In Office eSign** check box.
- Click "**I Agree**" check box.
- Select the **Race/Origin** In drop-down field.
- Ask customer all **Application Questions** and select answer in drop-down fields.
- Check the **MVR Report Box** and read statement to customer.
- Select the **PURCHASE & CONTINUE TO ESIGN** button


Remote eSign Producer Has Customer eSign NOT In Office (Insured email Required)

I Agree ☒ By checking this box, policy is issued and cannot be voided

MVR Report

☒ Verify you have advised the Insured that we are about to run it

READ THIS TO THE CUSTOMER: BRAVO uses information from you to explain how BRAVO discovers and protects your personal information.

 **PURCHASE & CONTINUE TO ESIGN**



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ESIGN SCREEN

Once the **Producer Section** has been completed, the system will automatically send an email to the customer to allow them to complete their portion of the **eSignature Process**.

Cancel this eSignature Session

While the Customer is completing their portion of eSignatures, please scroll down and complete the producer sections of eSignature sections below. You will notice that the grayed out, faded regions are for the Customer only and that your sections are shown in a more prominent, black text. When both you and the Customer are done, the Customer will then have the ability to «Purchase» the policy and you will be automatically redirected to the confirmation page where you can obtain the policy documents.

As the **Producer/Agent** completing this transaction, you need to complete your portion of the **Authentication Process**. Click the **Box** and type in your **Name** where indicated.



AUTHENTICATION

Producer and Applicant agree to enter into and complete the entire application for insurance with Incline National Insurance Company electronically. Producer and applicant also agree to receive and read all consumer notices and disclosures in electronic form.

☐ Applicant (The check box will record the time and date it was marked)


☒ **Producer** (The check box will record the time and date it was marked)

[brad cain]
(APPLICANT), I BRAD CAIN, understand that by electronically answering the following security questions, I certify that I have reviewed the entire application for insurance with my producer, that my answers are true and correct and that I received, read and understood the entire application for insurance, including, but not limited to, underwriting guidelines, binding procedures, notices, disclosures and/or waivers. I fully understand that I have electronically signed this application for insurance and my eSignature will be deemed the original for all purposes.

1. Applicant Question: Please select Answer:

2. Applicant Question: Please select Answer:

(PRODUCER), I understand that by electronically signing below, I certify that I have reviewed the entire application for insurance with the Applicant and assisted the Applicant in completing the entire application for insurance including, but not limited to, underwriting guidelines, binding procedures, notices, disclosures and/or waivers.

Name of Producer submitting the application: STEVE MORENO 



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ESIGN SCREEN

After checking all **Boxes** on the **eSign Screens** and typing in your **Name** where indicated, click the **Complete Producer eSign** button.


PRODUCER STATEMENT

The undersigned hereby warrants and certifies that the information contained herein is correct to the best of his/her knowledge and this application was completed and signed by the insured applicant and that a copy of the new business documents, this application and a copy of the policy contract has been provided to the insured-applicant. Additionally, the undersigned Producer certifies that he/she is licensed in good standing under the Insurance Code of California.

PRODUCER WARRANTS AND DECLARES that all the coverages on this application have been explained to the applicant and have been offered to the applicant and that this application accurately represents the coverages selected by the applicant.

☒

By clicking this box and providing my name, I attest that I have read and explained the terms and conditions to the Applicant and the Applicant understands and agrees to these terms and conditions AND I fully understand that I have electronically signed the application for insurance and that my eSignature will be deemed the original for all purposes.



Complete Producer eSign

Cancel this eSignature Session



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PRODUCER NOTE

The **Producer Note** screen will now pop-up on the screen.

****Scroll up** to see this note if you are still at the bottom of the screen.

There are two options to choose to complete the Remote eSign.

BEST PRACTICE: Stay on the **Remote eSign** page while the customer completes their **eSignature** process.

NOTE: Coverage will **NOT** be bound until the customer completes the **eSignature** process.

Click the **Save & Send Customer Invite** button.

Producer Note [X]

Dear Producer,
You have completed all of the required producer eSignatures, david rosen now has until 11:59 PM today to complete their eSignatures and purchase this policy.
No coverages will be in effect until they have done this!
You will be notified via email once the Insured has completed their eSignatures and purchase the policy. If the customer does not complete their eSignature and purchase the policy today you will also be notified by email and a new eSignature session will be required to complete the purchase of the policy.

☒ I would like to remain on the eSign page while david rosen completes their eSignatures
☐ david rosen will be completing their eSignatures later today and I would like to return to the homepage

Save & Send Customer Invite Cancel



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The Insured will receive the following **Confirmation Receipt** immediately upon their completing their **eSignatures**. This is automatically generated by the system.

the policy documents will be included in the automated receipt.



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Policy Summary

Insured Name	david rosen
Effective date	9/14/2020
Policy ID	DM_IN_CA000011-00
Expiration date	3/14/2021
Policy Status	IN-FORCE
Duration	6 month(s)
Policy total + Fees	\$309.88
Payment Plan	16.66% Down-5 Installment

Policy Documents

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1.0.0.42070848 BRAVO/staging, origin/BRAVO/staging/42070848f9ee796235593912ff649eb64b756187/Wed Aug 26 18:32:10 2020 +0300



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POLICY SUMMARY SCREEN

The system will take you to the **Policy Summary Screen** and show all pertinent information for this customer. The policy purchase has now been completed, and the policy is now **BOUND**.

Policies	Effective Dates	Status	Insurance Carrier	LOB	Term Premium + Fees
DM_IN_CA000011-00	09/14/2020 — 03/14/2021	In-Force	Knightbrook	PPA	\$309.88

Named Insured - Customer Since: 09/14/2020
david rosen
3007 CORONADO DR
FULLERTON, CA. 92835
EMAIL: [david.rosen@knightbrook.com](#)
In-Force

Producer Information
Test Agency - Producer#0001
123 Main St, Calabasas, CA, 91302
Office (555) 555-5555

Payment Info
Due By: 10/14/2020
Premium Due: \$46.17
Total Amount Due: \$46.17
Policy Pay Off Amount: \$230.85
Last Payment received: 09/14/2020
Last Payment amount: \$79.03
PAY NOW

Total Premium: \$277.00
Fees: \$32.88
Total: \$309.88

Viewing Policy: DM_IN_CA000011-00 **EDIT COVERAGE** **EDIT VEHICLES** Rating XML Policy Risks Insured Portal (Not Registered)

Policy Summary:
Vehicle #1
2015 Ford FIESTA
VIN: 3FADP4GX1FM146202
Garaging Zip Code: 92835



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How to Retrieve ID Cards and Policy Documents




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ID CARDS / POLICY DOCUMENTS

Bridger Home Page - Click the “**POLICY SEARCH**” Button





Root 


MY E-VOLVE


MANAGMENT


RECENT


 Home


 New Submission


 Policy Search

 Registered Mail

 Billing System

 Reports

 Claim System

 Help Desk

MAIN

SYSTEMS

Home x

Submissions

LOB —

Pending Issuance 0

Pending Cancellations 0

Pending Renewal Offers 0

Non-Renewals 0

Out Of Office Signatures 1

Declined Payments (Today - 0)

Pending Incoming Docs

Download materials

Agency Downloads

Download Forms & Applications

Questions & Notifications

UW —

Open Items 0

News & Information

Producer Notification Pending 0



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Input Policy Number or Insured Last Name in corresponding field and click the “**SEARCH**” Button

Home x Policy Search x

Policy #	DM_IN_CA000002-00	←
Quote #		
Last Name	Moreno	←
First Name		
Commercial Name		
Policy/Submission Status	All	▼
State	All	▼
Search By LOB	All	▼
Program	Fiesta Auto	▼
Producer Code		
Search By	Effective Date	▼
From Date	09/04/2020	
To Date	09/04/2020	
Business Type	All	▼

→ SEARCH



BRIDGER

Click the **VIEW POLICY** button

Home x Policy Search x

Export Show 20 entries Search:

Policy #	Quote #	Submission Date/Time	Producer Code	Insured Name/DBA	Program	Policy Status	Eff Date	Exp/Cancel Date
DM_IN_CA000002-00	452763	09/01/2020 06:49:24 AM	Root 0001	Elena Test		In-Force	09/01/2020	03/01/2021

Showing 1 to 1 of 1 entries

NEW SEARCH

VIEW POLICY

Previous 1 Next



BRIDGER

ID CARDS / POLICY DOCUMENTS

Click the **DOCUMENTS** link on the left side of the screen.

Policy Summary	Policies	Effective Dates	Status	Insurance Carrier	LOB	Term Premium + Fees
Policy History	DM_IN_CA000015-00	09/17/2020 — 03/17/2021	In-Force	Knightbrook	PPA	\$693.88
Policy Info	Named Insured - Customer Since: 09/17/2020		Producer Information		Payment Info	
Rewrite	forms forms		Test Agency - Producer#0001		Due By:	
Endorsement	1807 parkway		123 Main St, Calabasas, CA, 91302		Premium Due:	
Cancellation	YORBA LINDA, CA. 92887		Office (555) 555-5555		Billing/Installment Fee	
Non Renew Policy	EMAIL:				Total Amount Due:	
Suspense Diary	In-Force				Policy Pay Off Amount:	
Documents	Total Premium: \$665.00				Last Payment received:	
Billing System	Fees: \$28.88				Last Payment amount:	
	Total: \$693.88					





BRIDGER

The **Documents** screen allows you to email a **PDF** file to the customer that contains the **ID Card** and **Policy Documents**.

- You must check the box to email the **Policy Documents**.
- The system will automate the wording to the customer that will appear in the email.
- Make sure to **Confirm** the **Insured's Email Address** is correct and then click the **SEND** button.

Insured Name/DBA forms forms **Effective date** 09/17/2020
Policy ID DM_IN_CA000015-00 **Expiration date** 03/17/2021
Policy Status In-Force **Duration** Months/6 month(s)
Payment plan 16.66% Down-5 Installments EFT
Suspense/Diary: None **Policy total + Fees** \$693.88

Basic Documents and Packages

Policy (Insured's copy) [View Document](#) Select to Email Document ☒
Policy (Producer's copy) [View Document](#) Select to Email Document ☐

[Click Here](#) to go to the Policy History page where you can view all documents associated with each policy transaction.

Emails

[View Sent Emails](#)

Email the Policy Documents and Policy Attachments

To:
CC:
From:
Subject:

Dear forms forms.
Below is a link to your insurance Policy Documents!
• [Policy \(Insured's copy\)](#)

body p

Send

Virtual Time: 9/17/2020 3:01



BRIDGER

How to Locate and Identify

Payment Due Date


Payment Amount (\$\$) Due



BRIDGER

PAYMENT DUE DATE / PAYMENT AMOUNT

Bridger Home Page - Click the “**POLICY SEARCH**” Button



The image shows the Bridger home page interface. At the top, there are tabs for 'MY E-VOLVE', 'MANAGEMENT', and 'RECENT'. Below these, there are two main sections: 'MAIN' and 'SYSTEMS'. The 'MAIN' section contains buttons for 'Home', 'New Submission', 'Policy Search', and 'Registered Mail'. The 'SYSTEMS' section contains buttons for 'Billing System', 'Reports', 'Claim System', and 'Help Desk'. Below the navigation bar, there are four main content areas: 'Submissions', 'Download materials', 'Questions & Notifications', and 'News & Information'. The 'Submissions' area shows a list of pending items with counts. The 'Download materials' area has a link to 'Download Forms & Applications'. The 'Questions & Notifications' area has a dropdown menu for 'UW' and 'Open Items'. The 'News & Information' area shows 'Producer Notification Pending' with a count.

MY E-VOLVE **MANAGEMENT** **RECENT**

MAIN

Home New Submission **Policy Search** Registered Mail

SYSTEMS

Billing System Reports Claim System Help Desk

Home x

Submissions

LOB — PPA

Pending Issuance 0
Pending Cancellations 0
Pending Renewal Offers 0
Non-Renewals 0
Out Of Office Signatures 2
Declined Payments (Today - 0)
Pending Incoming Docs

Download materials

Agency Downloads
Download Forms & Applications

Questions & Notifications

UW — All
Open Items 0 All

News & Information

Producer Notification Pending 0



BRIDGER

Input Policy Number in corresponding field and click the “**SEARCH**” Button

Policy #	<input type="text" value="DM_IN_CA000002-00"/>
Quote #	<input type="text"/>
Last Name	<input type="text"/>
First Name	<input type="text"/>
Commercial Name	<input type="text"/>
Policy/Submission Status	<input type="text" value="All"/>
State	<input type="text" value="All"/>
Search By LOB	<input type="text" value="All"/>
Program	<input type="text" value="Fiesta Auto"/>
Producer Code	<input type="text"/>
Search By	<input type="text" value="Effective Date"/>
From Date	<input type="text" value="09/08/2020"/>
To Date	<input type="text" value="09/08/2020"/>
Business Type	<input type="text" value="All"/>

SEARCH



BRIDGER

Click the **VIEW POLICY** button

Home x Policy Search x

Export Show 20 entries Search:

Policy #	Quote #	Submission Date/Time	Producer Code	Insured Name/DBA	Program	Policy Status	Eff Date	Exp/Cancel Date	
DM_IN_CA000002-00	452763	09/01/2020 06:49:24 AM	Root 0001	Elena Test		n-Force	09/01/2020	03/01/2021	VIEW POLICY

Showing 1 to 1 of 1 entries

Previous 1 Next





BRIDGER

PAYMENT DUE DATE / PAYMENT AMOUNT

Information will be shown in the **Payment Info Box** on the right side of the screen.

If the customer wishes to make a payment, click the **PAY NOW** button.

Policies	Effective Dates	Status	Insurance Carrier	LOB	Term Premium + Fees
DM_IN_CA000002-00	09/01/2020 — 03/01/2021	In-Force	Knightbrook	PPA	\$908.88

Named Insured - Customer Since: 09/01/2020
Elena Test
422 Queen Anne Dr
Chula Vista, CA. 91911
EMAIL: elena@informins.com
In-Force

Producer Information
Test Agency - Producer#0001
123 Main St, Calabasas, CA, 91302
Office (555) 555-5555

Payment Info
Due By: 12/30/2020
Premium Due: \$140.18
Total Amount Due: \$140.18
Policy Pay Off Amount: \$280.35
Last Payment received: 09/08/2020
Last Payment amount: \$140.18
PAY NOW




BRIDGER

How to Process a Payment



BRIDGER

Bridger Home Page - Click the “POLICY SEARCH” Button



MY E-VOLVE **MANAGMENT** RECENT

Home New Submission **Policy Search** Registered Mail

Billing System Reports Claim System Help Desk

MAIN **SYSTEMS**

Home x

Submissions

LOB — PPA v

- Pending Issuance 0
- Pending Cancellations 0
- Pending Renewal Offers 0
- Non-Renewals 0
- Out Of Office Signatures 1
- Declined Payments (Today - 0)
- Pending Incoming Docs

Download materials

Agency Downloads

Download Forms & Applications

Questions & Notifications

UW — All v

Open Items 0 All v

News & Information

Producer Notification Pending 0



BRIDGER

Input Policy Number OR Insured Last Name in the corresponding field and click the “**SEARCH**” Button

Home x Policy Search x

Policy #	DM_JN_CA000002-00
Quote #	
Last Name	Moreno
First Name	
Commercial Name	
Policy/Submission Status	All
State	All
Search By LOB	All
Program	
Producer Code	
Search By	Effective Date
From Date	09/04/2020
To Date	09/04/2020
Business Type	All

SEARCH

Use the policy number for quickest result when searching. Only use Last Name when policy number is not provided



BRIDGER

Click the **VIEW POLICY** Button

Home x Policy Search x

Export Show 20 entries Search:

Policy #	Quote #	Submission Date/Time	Producer Code	Insured Name/DBA	Program	Policy Status	Eff Date	Exp/Cancel Date
DM_IN_CA000002-00	452763	09/01/2020 06:49:24 AM	0001	Elena Test		In-Force	09/01/2020	03/01/2021

Showing 1 to 1 of 1 entries

NEW SEARCH

VIEW POLICY

Previous 1 Next



BRIDGER

Click the **PAY NOW** button in **Payment Info Section**

[Home](#) x [Policy Search](#) x [DM_IN_CA000002-00](#) x

[Policy Summary](#)
[Policy History](#)
[Policy Info](#)
[Rewrite](#)
[Endorsement](#)
[Cancellation](#)
[Non Renew Policy](#)
[Suspense Diary](#)
[Documents](#)
[Billing System](#)
[Notes](#)
[Back to Search](#)

Policies	Effective Dates	Status	Insurance Carrier	LOB	Term Premium + Fees
DM_IN_CA000002-00	09/01/2020 — 03/01/2021	In-Force	FIESTA	PPA	\$908.88

Named Insured - Customer Since: 09/01/2020
Elena Test
422 Queen Anne Dr
Chula Vista, CA. 91911
EMAIL: elena@informins.com
In-Force

Producer Information
Test Agency - Producer#0001
123 Main St, Calabasas, CA, 91302
Office (555) 555-5555

Total Premium: \$841.00
Fees: \$67.88
Total: \$908.88

[EDIT COVERAGE](#) [EDIT VEHICLES](#) [Rating XML](#) [Policy Risks](#) [Insured Portal](#) (Not Registered)

Policy Summary:
Vehicle #1

Payment Info

Due By:	10/01/2020
Premium Due:	\$140.18
Total Amount Due:	\$140.18
Policy Pay Off Amount:	\$700.89
Last Payment received:	--
Last Payment amount:	--

[PAY NOW](#)





BRIDGER

Payment Amount must be equal to or higher than **Amount Due**.

Input the amount the customer wishes to pay, and select the **Payment Instrument** in the drop-down field.

Note: If the card-holder's name and address are the same as the insured, you can click the box to **Pre-Fill Insured Information**.

Complete all the fields, and ask the customer if they wish to save this card on file. If **YES**, click the box to **Save Credit Card on the Profile**.

After all the information has been input, click the **MAKE PAYMENT** button.

The screenshot shows the 'Settlement' page in the Bridger system. On the left is a navigation menu with options: Billing history, Billing info, Payment instruments, Account history, Customer search, and Back. The main content area displays policy details for 'DM_IN_CA000002-00' and 'Elena T...'. Below this, a 'Back' link and a 'Fields marked (*) are mandatory' warning are present. The payment section includes fields for 'Payment Due Date' (10/01/2020), 'Payment Amount Due' (\$140.18), and 'Payment Amount*' (140.18). A section for 'Applicable Fees (unchecked to waive)' is also shown. The 'Payment Instrument Type' is set to 'Insured Credit/Debit Card', and the 'Payment Instrument' is 'No credit cards found'. A blue arrow labeled 'Note*' points to the 'Check Here if you would like to use the same Name & Address info as the Customer!' checkbox. An orange arrow labeled 'Payment Instrument Type' points to the 'Insured Credit/Debit Card' dropdown. Below the checkbox, there are input fields for cardholder information: Cardholder First Name* (Steve), Cardholder Last Name* (Moreno), Address 1* (123 Elm St), Address 2, City* (Fullerton), State* (California), Zip* (92835), Credit Card Type* (Visa), Credit Card Number* (4111111111111111), and Expiration Date* (January 2021). At the bottom, there is a 'Save Credit Card on the Profile' checkbox (checked) and a 'Make Payment' button, both indicated by blue arrows.

Policy #	DM_IN_CA000002-00
Insured Name/DBA	Elena T...
Producer Code/GA	0001/FIESTA
Policy Status	In force
Eff Date/Exp Date	From: 09/01/2020 To: 03/01/2021
Billing plan	16.66% Down-5 Installment

Back

Fields marked (*) are mandatory

Payment Due Date: 10/01/2020

Payment Amount Due: \$140.18

Payment Amount*: 140.18

Applicable Fees (unchecked to waive)

Payment Instrument Type: Insured Credit/Debit Card

Payment Instrument: No credit cards found

☒ Use another credit card

Note* ☐ Check Here if you would like to use the same Name & Address info as the Customer!

Cardholder First Name*: Steve

Cardholder Last Name*: Moreno

Address 1*: 123 Elm St

Address 2:

City*: Fullerton

State*: California

Zip*: 92835

Credit Card Type*: Visa

Credit Card Number*: 4111111111111111

Expiration Date*: January 2021

Save Credit Card on the Profile ☒

Make Payment



BRIDGER

CREDIT CARD PAYMENTS - The System will either Accept or Decline the payment.

The most common reasons for declination of a **Credit Card** are:

1. Card Declined due to over limit or no funds
2. Information provided was incorrect. Review the information with the customer and resubmit. If declined again, try another card.
3. If payment has been accepted, please provide the customer with the **Confirmation Number** then click the **CONTINUE TO POLICY** button.
4. An email confirmation will be generated to the customer as well.

DECLINE

Could not process the payment due to an error. No money was withdrawn from your account. Error details - Authorize GA data is undefined for gaId 21

[Back](#)

Fields marked (*) are mandatory

Payment Due Date	10/01/2020
Payment Amount Due	\$140.18
Payment Amount*	140.18
Applicable Fees (uncheck to waive)	
Payment Instrument Type	Insured Credit/Debit Card
Payment Instrument	No credit cards found <input checked="" type="checkbox"/> Use another credit card
<input type="checkbox"/> Check Here if you would like to use the same Name & Address info as the Customer!	
Cardholder First Name*	Steve
Cardholder Last Name*	Moreno
Address 1*	123 Elm St
Address 2	
City*	Fullerton
State*	California
Zip*	92835
Credit Card Type*	Visa
Credit Card Number*	4111111111111111
Expiration Date*	January 2022

Save Credit Card on the Profile

☒ Make Payment

ACCEPT

Reason displayed here

Thank you for making your payment!

Insured Name:

Policy Number:

Payment Date/Time:

Amount Paid:

Payment Instrument:

Confirmation #:

ELENA TEST

DM_IN_CA000002-00

09/08/2020 11:14:18 AM

\$140.18

Ins EFT

1356539/

Print

Continue To Policy



BRIDGER

How to Process an Endorsement

[Add / Delete / Change Vehicle](#)

[Pages 47-56](#)

[Add/Delete Driver](#)

[Pages 57-68](#)

[Edit Coverage](#)

[Pages 69-77](#)



BRIDGER

ADD / DELETE / CHANGE VEHICLE

Bridger Home Page - Click the “**POLICY SEARCH**” Button

The screenshot shows the Bridger Home Page interface. At the top, there are tabs for 'MY E-VOLVE', 'MANAGEMENT', and 'RECENT'. Below these are two main sections: 'MAIN' and 'SYSTEMS'. The 'MAIN' section contains buttons for 'Home', 'New Submission', 'Policy Search', and 'Registered Mail'. The 'SYSTEMS' section contains buttons for 'Billing System', 'Reports', 'Claim System', and 'Help Desk'. A blue arrow points to the 'Policy Search' button. Below the navigation bar, there are four main content areas: 'Submissions', 'Download materials', 'Questions & Notifications', and 'News & Information'. The 'Submissions' area shows a list of submission types with counts: Pending Issuance (0), Pending Cancellations (0), Pending Renewal Offers (0), Non-Renewals (0), Out Of Office Signatures (1), Declined Payments (Today - 0), and Pending Incoming Docs. The 'Download materials' area shows 'Agency Downloads' and 'Download Forms & Applications'. The 'Questions & Notifications' area shows 'UW' and 'Open Items' with dropdown menus. The 'News & Information' area shows 'Producer Notification Pending (0)'.

MY E-VOLVE **MANAGEMENT** **RECENT**

MAIN **SYSTEMS**

Home x

Submissions
LOB — PPA ▾
Pending Issuance 0
Pending Cancellations 0
Pending Renewal Offers 0
Non-Renewals 0
Out Of Office Signatures 1
Declined Payments (Today - 0)
Pending Incoming Docs

Download materials
Agency Downloads
Download Forms & Applications

Questions & Notifications
UW — All ▾
Open Items 0 All ▾

News & Information
Producer Notification Pending 0



BRIDGER

Input Policy Number OR Insured Last Name in corresponding field and click the “**SEARCH**” Button

[Home](#) [Policy Search](#)

Policy #	DM_IN_CA000002-00	← Use the policy number for quickest result when searching.
Quote #		
Last Name	Moreno	← Only use Last Name when policy number is not provided.
First Name		
Commercial Name		
Policy/Submission Status	All	
State	All	
Search By LOB	All	
Program		
Producer Code		
Search By	Effective Date	
From Date	09/04/2020	
To Date	09/04/2020	
Business Type	All	

→ **SEARCH**



BRIDGER

Click the **VIEW POLICY** button

Home x Policy Search x


Export Show 20 entries Search:

Policy #	Quote #	Submission Date/Time	Producer Code	Insured Name/DBA	Program	Policy Status	Eff Date	Exp/Cancel Date	
DM_IN_CA000002-00	452763	09/01/2020 06:49:24 AM	Root 0001	Elena Test		In-Force	09/01/2020	03/01/2021	VIEW POLICY

Showing 1 to 1 of 1 entries

NEW SEARCH

Previous 1 Next





BRIDGER

Click the **ENDORSEMENT** tab on the left side of the screen

Policy Summary

Policy History

Policy Info

Rewrite

Endorsement

Cancellation

Non Renew Policy

Suspense Diary

Documents

Billing System

Policies	Effective Dates	Status	Insurance Carrier	LOB	Term Premium + Fees
DM_IN_CA000012-00	09/15/2020 — 03/15/2021	In-Force	Knightbrook	PPA	\$779.88

Named Insured - Customer Since: 09/15/2020
steve minster
6011 SUN VIEW RD
YORBA LINDA, CA. 92886
EMAIL:
In-Force

Producer Information
Test Agency - Producer#0001
123 Main St, Calabasas, CA, 91302
Office (555) 555-5555

Payment Info
Due By: 10/15/2020
Premium Due: \$125.18
Billing/Installment Fee \$14.00
Total Amount Due: \$139.18
Policy Pay Off Amount: \$639.88
Last Payment received: 09/15/2020
Last Payment amount: \$154.00

Total Premium: \$751.00
Fees: \$28.88
Total: \$779.88



BRIDGER

ENDORSEMENT OPTION SCREEN

Input the **Effective Date** of the endorsement.

Click the **SAVE ENDORSEMENT EFFECTIVE DATE** button.

Select the **Transaction Type** you wish to process, and click the **LINK** for:

- **Add Vehicle / Change Vehicle / Delete Vehicle**

The screenshot shows the BRIDGER Endorsement Option Screen. At the top is a navigation bar with tabs: INSURED INFO, DRIVERS, VIOLATIONS, VEHICLES, LIMITS, QUOTE, MVR, and BINDING. Below this is a red header bar containing policy details: Insured: steve minster, Company: Incline National Insurance Company, Producer: 0001, Program: Incline National Insurance Company, Quote #: 452958 | EN, Policy #: DM_IN_CA000012-00, Period: 09/15/2020 — 03/15/2021 | 9/16/2020, and Policy state/status: CA/Created.

On the left is a sidebar menu with the following options: Policy (Change address), Drivers (Add driver, Change driver, Delete driver, Add/Edit Excluded Drivers), Vehicles (Add vehicle, Change vehicle, Delete vehicle), and Coverages (Change coverages). A large blue arrow points to the 'Vehicles' section.

The main content area is titled 'Endorsement effective date:' and contains a date input field with '09/16/2020'. A blue arrow points to this field. Below the date field are two buttons: 'SAVE ENDORSEMENT EFFECTIVE DATE' and 'DISCARD & RETURN'. A blue arrow points to the 'SAVE ENDORSEMENT EFFECTIVE DATE' button.



BRIDGER

VEHICLE SCREEN

Click the **ADD VEHICLE** button.

Complete all fields with a **Red*** for each additional vehicle

Once all vehicle information has been input, Click the **NEXT** button

The screenshot shows the 'VEHICLES' tab in the BRIDGER system. At the top, there's a navigation bar with tabs: INSURED INFO, DRIVERS, VIOLATIONS, **VEHICLES**, LIMITS, QUOTE, MVR, and BINDING. Below this is a red header bar containing policy details: Insured: steve minster, Company: Incline National Insurance Company, Producer: 0001, Program: Incline National Insurance Company, Quote #: 452958 | EN, Policy #: DM_IN_CA000012-00, Period: 09/15/2020 — 03/15/2021 | 9/16/2020, and Policy state/status: CA/Created.

The main section is titled 'VEHICLES' and contains two columns for vehicle entry. The first column is labeled '1 of 2' and the second '2 of 2'. Each column has a 'SEARCH BY VIN' field and a 'DELETE VEHICLE' button. The first column has a red '+' icon and the text 'ADD VEHICLE'. The second column has a red '-' icon and the text 'DELETE VEHICLE'.

Below the search fields, there are input fields for Year, Make, Model, MSRP / Cost New, and Vin (17 Digits). The first column has red asterisks (*) next to Year, Make, Model, and Vin. The second column has 'Please select' dropdowns for Year, Make, and Model, and empty input fields for MSRP / Cost New and Vin.

Below the vehicle input fields, there's a 'Vehicle Use' section with a red header. It contains input fields for Use, Estimated Annual Distance, Primary Driver, and Garaging Zipcode. The first column has red asterisks (*) next to Use, Estimated Annual Distance, Primary Driver, and Garaging Zipcode. The second column has 'Please select' dropdowns for Use and Primary Driver, and empty input fields for Estimated Annual Distance and Garaging Zipcode.

At the bottom right, there's a 'Virtual Time: 9/15/2020 1:00' timestamp.

Blue arrows point to the 'ADD VEHICLE' button, the vehicle input fields, and the 'NEXT' button.



BRIDGER

LIMITS SCREEN

Confirm the desired **Coverage(s)** with the customer.

The **Liability Limits** will automatically match that of the first vehicle.

****The Liability Limits can be changed, but the Liability Limits must be the same for all vehicles****

OTC/Collision Deductibles can be different for each vehicle listed on the policy.

Click the **RATE AND NEXT** button.

INSURED INFO DRIVERS VIOLATIONS VEHICLES **LIMITS** QUOTE MVR BINDING

Insured: steve minster Company: Incline National Insurance Company Producer: 0001 Program: Incline National Insurance Company
Quote #: 452958 | EN Policy #: DM_IN_CA000012-00 Period: 09/15/2020 — 03/15/2021 | 9/16/2020 Policy state/status: CA/Created

LIMITS DISCARD & RETURN SAVE & EXIT BACK **RATE AND NEXT**

Limits	Policy Limits	2015/Ford/FIESTA	2014/Ford/EDGE
BI: *	\$15,000/\$30,000		
PD: *	\$10,000		
MEDPM:	None		
UMBI:	None		
UMPD/CDW:	None		
Other than Collision:		\$1,000	\$500
Collision:		\$1,000	\$500

Liability Limits can be changed, if desired.

↑



BRIDGER

QUOTE SCREEN

This screen will show the **Additional / Return Premium**, the new **Installment Amount**, **Summary of Changes**, **Coverage Summary** and new **Premium** for the policy term. Provide this new information to the customer and ask if they wish to process these changes.

If **YES**, click the **NEXT** button.

If **NO**, click the **SAVE & EXIT** button, and advise the customer that the changes requested have not been processed or bound.

Insured: Elena Test
Quote #: 452941 | EN

Company: Incline National Insurance Company
Policy #: DM-IN-CA000002-00

Producer: 0001
Period: 09/01/2020 — 03/01/2021 | 9/15/2020

Program: Incline National Insurance Company
Policy state/status: CA/Created

QUOTE

DISCARD & RETURN SAVE & EXIT BACK NEXT

Driver's points Html trace for Incline National Insurance Company Xml trace for Incline National Insurance Company

Available Payment Options

Payment Method	AP/RP	Installment	Endorsement Total
16.66% Down-5 Installment	(\$226.05)	\$49.93	(\$221.05)

Summary of Changes

Vehicles summary

Vehicle 2014/Ford/EDGE was removed from policy

Vehicle 2015/Ford/FIESTA was added to policy

Coverages summary

Coverages	Policy Limits	Ford/2015 EV
BI	\$15,000/\$30,000	\$96.00
PD	\$10,000	\$86.00
MEDPM	\$1,000	\$34.00
UMBI	\$15,000/\$30,000	\$30.00
Other than Collision		\$122.00
Collision		Deductible \$1000
		\$265.00
		Deductible \$1000
Vehicles Total		\$633.00
Policy Total		\$633.00
	Current Policy Premium before Change	\$887.00
	New Policy Premium after Change	\$642.00
	Pro Rate Factor	0.923
	Prorated Policy Premium Difference	(\$226.05)
	Endorsement Fee:	\$5.00
	Endorsement Total:	(\$221.05)

DISCARD & RETURN SAVE & EXIT BACK NEXT



BRIDGER

BINDING SCREEN

This screen provides a **Premium Summary** of the requested changes.

The system will determine if any **Down Payment** is due as a result of the transactions.

If money is due, select the **Payment Method** in the drop-down field and input the **Payment Information**.

You can check the box on the left to pre-populate the insured's existing policy information.

The **Cardholder Agreement Box** at the bottom of the screen must also be checked.

Click the **BIND ENDORSEMENT** button to complete the endorsement process.

BINDING

DISCARD & RETURNSAVE & EXITBIND ENDORSEMENTBACK

Current Policy Premium before Change:	\$751.00
New Policy Premium after Change:	\$1,079.00
Prorated Policy Premium Difference:	\$326.19
Endorsement Fee	\$5.00
Total:	\$331.19

Down Payment Amount:

\$57.55

Down Payment Method *

Insured Credit/Debit Card

☒ Check Here if you would like to use the same Name & Address info as the Applicant!

Cardholder First Name *	STEVE
Cardholder Last Name *	MINSTER
Address 1 *	6011 SUN VIEW RD
Address 2	
City *	YORBA LINDA
State *	California
Zip *	92886
Credit Card Type *	Visa
Credit Card Number *	4111111111111111
Expiration Date *	January 2021

Cardholder agrees that their credit card will be charged for the Down Payment Amount shown above. I agree ☒

Payment method



BRIDGER

POLICY DETAILS SCREEN

This screen allows the **Broker / CSR** to email the new **Policy Documents** (*ID CARD - Declaration Page - Applicable Forms*) to the customer. **CONFIRM** the **Insured's Email Address** prior to emailing documents, then click the **SEND** button. The **Endorsement Transaction** is now complete.

Policy Detail [Print](#)

Insured Name/DBA	Elena Test	Effective date	09/01/2020
Policy ID	DM_IN_CA000002-00	Expiration date	03/01/2021
Policy Status	In-Force	Duration	Months/6 month(s)
		Payment plan	16.66% Down-5 Installment
Suspense/Diary: None		Policy total + Fees \$709.00	

Basic Documents and Packages

[Click Here](#) to go to the Policy History page where you can view all documents associated with each policy transaction.

Email the Policy Documents and Policy Attachments

To:

CC:

From:

Subject:

← **Insured's email address**

← **Broker / CSR email address**

Dear Elena Test.
Below is a link to your insurance Policy Documents!

→ **Send**


Virtual Time: 9/14/2020 12




BRIDGER

ADD / DELETE DRIVER

Bridger Home Page - Click the “**POLICY SEARCH**” Button



Root 

MY E-VOLVE **MANAGEMENT** **RECENT**

Home New Submission **Policy Search** Registered Mail

MAIN

Billing System Reports Claim System Help Desk

SYSTEMS

Home ×

Submissions

LOB — PPA ▾

- Pending Issuance **0**
- Pending Cancellations **0**
- Pending Renewal Offers **0**
- Non-Renewals **0**
- Out Of Office Signatures **1**
- Declined Payments (Today - **0**)
- Pending Incoming Docs

Download materials

Agency Downloads

Download Forms & Applications

Questions & Notifications

UW — All ▾

Open Items **0** All ▾

News & Information

Producer Notification Pending **0**



BRIDGER

Input Policy Number or Insured Last Name in corresponding field and click the “**SEARCH**” Button

Home x Policy Search x

Policy #	DM_IN_CA000002-00
Quote #	
Last Name	Moreno
First Name	
Commercial Name	
Policy/Submission Status	All
State	All
Search By LOB	All
Program	Fiesta Auto
Producer Code	
Search By	Effective Date
From Date	09/04/2020
To Date	09/04/2020
Business Type	All

SEARCH

Use the policy number for quickest result when searching.

Only use Last Name when policy number is not provided.





BRIDGER

Click the **VIEW POLICY** button

Home x Policy Search x

Export Show 20 entries Search:

Policy #	Quote #	Submission Date/Time	Producer Code	Insured Name/DBA	Program	Policy Status	Eff Date	Exp/Cancel Date
DM_IN_CA000002-00	452763	09/01/2020 06:49:24 AM	Root 0001	Elena Test		In-Force	09/01/2020	03/01/2021

Showing 1 to 1 of 1 entries

NEW SEARCH

VIEW POLICY


Previous 1 Next



BRIDGER

POLICY SUMMARY SCREEN

Click the **ENDORSEMENT** link on the left side of the screen.



- Policy Summary
- Policy History
- Policy Info
- Rewrite
- Endorsement**
- Cancellation
- Non Renew Policy
- Suspense Diary
- Documents
- Billing System
- Notes
- Back to Search

Policies	Effective Dates	Status	Insurance Carrier	LOB	Term Premium + Fees
DM_IN_CA000012-00	09/15/2020 — 03/15/2021	In-Force	Knightbrook	PPA	\$1,107.00

Named Insured - Customer Since: 09/15/2020
steve minster
6011 SUN VIEW RD
YORBA LINDA, CA. 92886
EMAIL: smoreno@fiestafranchise.com
In-Force

Producer Information
Test Agency - Producer#0001
123 Main St, Calabasas, CA, 91302
Office (555) 555-5555

Payment Info
Due By: 10/15/2020
Premium Due: \$215.18
Billing/Installment Fee: \$14.00
Endorsement Fee: \$5.00
Total Amount Due: \$234.18
Policy Pay Off Amount: \$918.52
Last Payment received: 09/15/2020
Last Payment amount: \$57.55

Total Premium: \$1,079.00
Fees: \$28.88
Total: \$1,107.88

Viewing Policy: DM_IN_CA000012-00 [EDIT COVERAGE](#) [EDIT VEHICLES](#) Rating XML Policy Risks Insured Portal (Not Registered)

Policy Summary:

Vehicle #1
2015 Ford FIESTA
VIN: 3FADP4GX1FM146202
Garaging Zip Code: 92886

Vehicle #2
2014 Ford EDGE
VIN: 2FMK3J9E111111111
Garaging Zip Code: 92886

Virtual Time: 9/15/2020



BRIDGER


ENDORSEMENT OPTION SCREEN

Input the **Effective Date** of the endorsement.

Click the **SAVE ENDORSEMENT EFFECTIVE DATE** button.

Select the **Transaction Type** you wish to process, and click the **LINK** for:

- **Add Driver / Change Driver / Delete Driver / Add - Edit Excluded Drivers**



Home x Policy Search x DM_IN_CA000012-00 x

INSURED INFO DRIVERS VIOLATIONS VEHICLES LIMITS QUOTE MVR BINDING

Insured: steve minster	Company: Incline National Insurance Company	Producer: 0001	Program: Incline National Insurance Company
Quote #: 452960 EN	Policy #: DM_IN_CA000012-00	Period: 09/15/2020 — 03/15/2021 9/16/2020	Policy state/status: CA/Created

Policy

- Change address

Drivers

- Add driver
- Change driver
- Delete driver
- Add/Edit Excluded Drivers

Vehicles

- Add vehicle
- Change vehicle
- Delete vehicle

Coverages

- Change coverages

Endorsement effective date:

09/16/2020

SAVE ENDORSEMENT EFFECTIVE DATE DISCARD & RETURN



BRIDGER

DRIVERS SCREEN

Click the **ADD DRIVER** button.

New **Driver** fields will now appear.

Complete all fields where there is a **Red*** for each **Additional Driver**.

Once all **Driver Information** has been entered, click the **NEXT** button.



DRIVERS	
+ ADD DRIVER 1 of 2 DELETE DRIVER 2 of 2	
Rated or Excluded *	Rated
Reason Excluded	N/A
First Name *	ELENA
Middle Initial	
Last Name *	TEST
Gender *	Female
Marital Status *	Single
Date of Birth *	09/18/1978
Relationship to Named Insured *	INSURED
License Information	
Current License State *	California
Current License Number *	C1234567
License Status *	Active
Current US License Years/Months *	26 0
Total US License Years/Months *	26 0
International Years/Months	0 0



Complete all fields with the **Red***

DISCARD & RETURN	SAVE & EXIT	← BACK	NEXT →
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BRIDGER

VIOLATIONS SCREEN

Click the  button to add **Accidents** or **Moving Violations**.

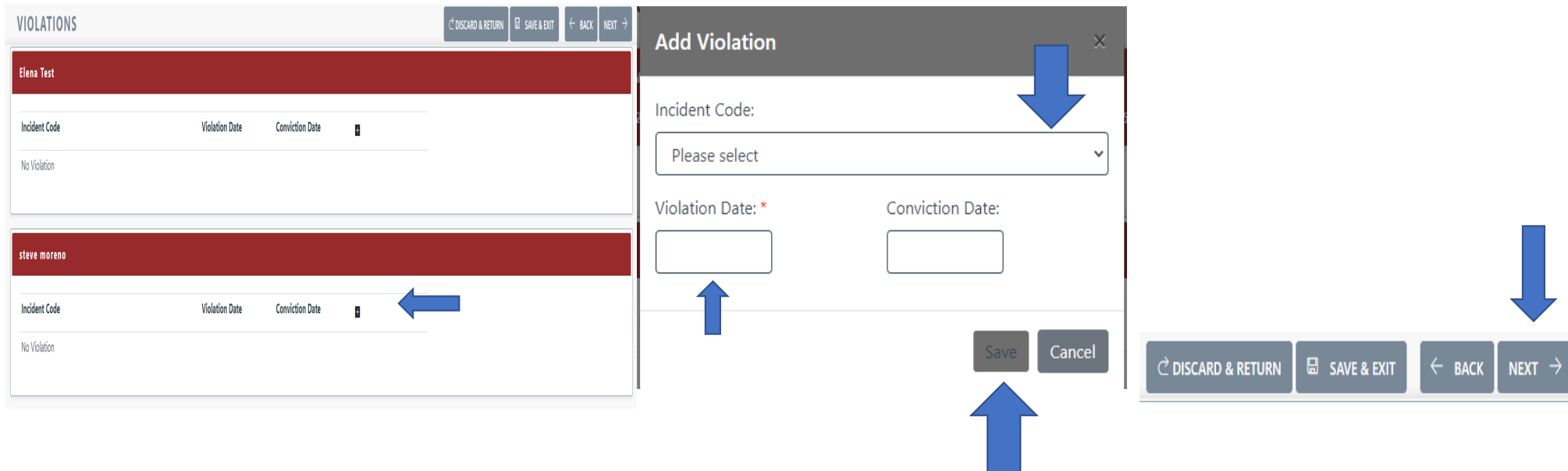
The **Add Violation** pop-up window will now appear.

Select the appropriate **Incident Code** from the drop-down field and input the **Violation Date**.

After inputting each violation, click the **SAVE** button .

After all driving activity has been input, click the **NEXT** button.

If no **Driving Activity** needs to be entered, just click the **NEXT** button.



The image shows the 'VIOLATIONS' screen and the 'Add Violation' pop-up window. The 'VIOLATIONS' screen has a table with two rows: 'Elena Test' and 'steve moreno'. Each row has columns for 'Incident Code', 'Violation Date', 'Conviction Date', and a plus icon. The 'Add Violation' pop-up window is open, showing a form with a dropdown for 'Incident Code', input fields for 'Violation Date' and 'Conviction Date', and 'Save' and 'Cancel' buttons. Blue arrows indicate the flow: from the plus icon in the 'steve moreno' row to the 'Add Violation' window, from the 'Incident Code' dropdown to the 'Violation Date' field, from the 'Violation Date' field to the 'Save' button, and from the 'Save' button to the 'NEXT' button in the bottom navigation bar.

VIOLATIONS

DISCARD & RETURN SAVE & EXIT BACK NEXT

Elena Test

Incident Code	Violation Date	Conviction Date	
No Violation			

steve moreno

Incident Code	Violation Date	Conviction Date	
No Violation			

Add Violation

Incident Code:

Please select


Violation Date: * Conviction Date:

Save Cancel

DISCARD & RETURN SAVE & EXIT BACK NEXT



If no additional **Vehicles** are to be added, Click the **NEXT** button.
If a vehicle needs to be added while there is a driver change, click the **ADD VEHICLE** button.
Input all vehicle information where there is a **Red*** for each additional **Vehicle**.
After all additional **Vehicles** have been added, click the **NEXT** button.



DISCARD & RETURN SAVE & EXIT ← BACK NEXT →



BRIDGER

LIMITS SCREEN

The **Limits** shown will be the **Limits** the insured currently has on their policy.
If the insured wishes to change their **Coverage(s)**, you may make those changes now.
Once all changes have been entered, click the **RATE AND NEXT** button.
If no changes to **Limits** are desired, click the **RATE AND NEXT** button.

LIMITS			DISCARD & RETURN	SAVE & EXIT	BACK	RATE AND NEXT
Limits	Policy Limits	2015/Ford/FIESTA				
BI: *	\$15,000/\$30,000					
PD: *	\$10,000					
MEDPM:	\$1,000					
UMBI:	\$15,000/\$30,000					
UMPD/CDW:	\$3,500 or CDW					
Other than Collision:		\$1,000				
Collision:		\$1,000				





BRIDGER

QUOTE SCREEN

This page will show:

Additional / Return Premium, Installment Change, Endorsement Total, Summary of Changes, Coverage Summary, Current and New Premium.

If the insured agrees with the **New Premium** and wishes to process the **Endorsement**, click the **NEXT** button.

If the insured **DOES NOT** want to proceed with the changes, click **SAVE & EXIT** button.

Be sure to advise the insured that the changes have not been processed or bound.

QUOTE

DISCARD & RETURN

SAVE & EXIT

BACK

NEXT →

Driver's points Html trace for Incline National Insurance Company Xml trace for Incline National Insurance Company

Available Payment Options

Payment Method	AP/DP	Installment	Endorsement Total
16.66% Down-3 Installment	\$0.00	\$44.90	\$0.00

Summary of Changes

Drivers summary

New driver: steve moreno

Coverages summary		
Coverages	Policy Limits	Ford/2015 EV
BI	\$15,000/\$30,000	\$96.00
PD	\$10,000	\$66.00
MEDPA	\$1,000	\$34.00
UMBI	\$15,000/\$30,000	\$30.00
Other than Collision		\$122.00 Deductible \$1000
Collision		\$265.00 Deductible \$1000
Vehicles Total		\$633.00
Policy Total		\$633.00
		Current Policy Premium before Change \$642.00
		New Policy Premium after Change \$642.00
		Pro Rate Factor 0.923
		Prorated Policy Premium Difference \$0.00
		Endorsement Total: \$0.00

DISCARD & RETURN

SAVE & EXIT

BACK

NEXT →





BRIDGER

BINDING SCREEN

Click the **BIND ENDORSEMENT** button to complete the endorsement process.

[INSURED INFO](#) [DRIVERS](#) [VIOLATIONS](#) [VEHICLES](#) [LIMITS](#) [QUOTE](#) [MVR](#) **[BINDING](#)**

Insured: Elena Test
Quote #: 452943 | EN

Company: Incline National Insurance Company
Policy #: DM_IN_CA000002-00

Producer: 0001
Period: 09/01/2020 — 03/01/2021 | 9/15/2020

Program: Incline National Insurance Company
Policy state/status: CA/Created

BINDING

[DISCARD & RETURN](#) [SAVE & EXIT](#) **[BIND ENDORSEMENT](#)** [← BACK](#)

Current Policy Premium before Change:	\$642.00
New Policy Premium after Change:	\$642.00
Prorated Policy Premium Difference:	\$0.00
Total:	\$0.00

Do Not Print: ☐





BRIDGER

POLICY DETAILS SCREEN

This screen allows the **Broker / CSR** to email the new **Policy Documents** (*ID CARD - Declaration Page - Applicable Forms*) to the customer. **CONFIRM** the **Insured's Email Address** prior to emailing documents, then click the **SEND** button. The **Endorsement Transaction** is now complete.

Policy Detail [Print](#)

Insured Name/DBA	Elena Test	Effective date	09/01/2020
Policy ID	DM_IN_CA000002-00	Expiration date	03/01/2021
Policy Status	In-Force	Duration	Months/6 month(s)
		Payment plan	16.66% Down-5 Installment
Suspense/Diary: None		Policy total + Fees	\$709.00

Basic Documents and Packages

[Click Here](#) to go to the Policy History page where you can view all documents associated with each policy transaction.

Email the Policy Documents and Policy Attachments

To:

CC:

From:

Subject:

← Insured's email address

Dear Elena Test.
Below is a link to your insurance Policy Documents!

[Send](#)


Virtual Time: 9/14/2020 12




BRIDGER

EDIT COVERAGE

Bridger Home Page - Click the “**POLICY SEARCH**” Button



Root 

MY E-VOLVE **MANAGEMENT** **RECENT**

MAIN **SYSTEMS**

Home New Submission **Policy Search** Registered Mail Billing System Reports Claim System Help Desk

Home x

Submissions

LOB —

- Pending Issuance **0**
- Pending Cancellations **0**
- Pending Renewal Offers **0**
- Non-Renewals **0**
- Out Of Office Signatures **1**
- Declined Payments (Today - **0**)
- Pending Incoming Docs

Download materials

Agency Downloads

Download Forms & Applications

Questions & Notifications

UW —

Open Items **0**

News & Information

Producer Notification Pending **0**



BRIDGER

Input Policy Number or Insured Last Name in corresponding field and click the “**SEARCH**” Button

Home x Policy Search x

Policy #	DM_IN_CA000002-00
Quote #	
Last Name	Moreno
First Name	
Commercial Name	
Policy/Submission Status	All
State	All
Search By LOB	All
Program	Fiesta Auto
Producer Code	
Search By	Effective Date
From Date	09/04/2020
To Date	09/04/2020
Business Type	All

SEARCH

Use the policy number for
quickest result when
searching.

Only use Last Name when
policy number is not
provided.



BRIDGER

Click the **VIEW POLICY** button

[Home](#) [Policy Search](#)

Export

Show 20 entries

Search:

Policy #	Quote #	Submission Date/Time	Producer Code	Insured Name/DBA	Program	Policy Status	Eff Date	Exp/Cancel Date
DM_IN_CA000002-00	452763	09/01/2020 06:49:24 AM	Root 0001	Elena Test		In-Force	09/01/2020	03/01/2021

Showing 1 to 1 of 1 entries

VIEW POLICY

Previous

1

Next

NEW SEARCH





BRIDGER

POLICY SUMMARY SCREEN

Click the **ENDORSEMENT** link on the left side of the screen.



[Policy Summary](#)
[Policy History](#)
[Policy Info](#)
[Rewrite](#)
[Endorsement](#)
[Cancellation](#)
[Non Renew Policy](#)
[Suspense Diary](#)
[Documents](#)
[Billing System](#)
[Notes](#)
[Back to Search](#)

Policies	Effective Dates	Status	Insurance Carrier	LOB	Term Premium + Fees
DM_IN_CA000012-00	09/15/2020 — 03/15/2021	In-Force	Knightbrook	PPA	\$1,107.00

Named Insured - Customer Since: 09/15/2020
steve minster
6011 SUN VIEW RD
YORBA LINDA, CA. 92886
EMAIL:
In-Force

Producer Information
Test Agency - Producer#0001
123 Main St, Calabasas, CA, 91302
Office (555) 555-5555

Payment Info
Due By: 10/15/2020
Premium Due: \$215.18
Billing/Installment Fee: \$14.00
Endorsement Fee: \$5.00
Total Amount Due: \$234.18
Policy Pay Off Amount: \$918.52
Last Payment received: 09/15/2020
Last Payment amount: \$57.55

Total Premium: \$1,079.00
Fees: \$28.88
Total: \$1,107.88

Viewing Policy: DM_IN_CA000012-00 [EDIT COVERAGE](#) [EDIT VEHICLES](#) Rating XML Policy Risks Insured Portal (Not Registered)

Policy Summary:

Vehicle #1
2015 Ford FIESTA
VIN: 3FADP4GX1FM146202
Garaging Zip Code: 92886

Vehicle #2
2014 Ford EDGE
VIN: 2FMK3J9E111111111
Garaging Zip Code: 92886

Virtual Time: 9/15/2020



BRIDGER

ENDORSEMENT OPTION SCREEN

Input the **Effective Date** of the endorsement.

Click the **SAVE ENDORSEMENT EFFECTIVE DATE** button.

Select the **Transaction Type** you wish to process, and click the **LINK** for:

- **Change Coverages**

Home x Policy Search x DM_IN_CA000012-00 x

INSURED INFO DRIVERS VIOLATIONS VEHICLES LIMITS QUOTE MVR BINDING

Insured: steve minster	Company: Incline National Insurance Company	Producer: 0001	Program: Incline National Insurance Company
Quote #: 452960 EN	Policy #: DM_IN_CA000012-00	Period: 09/15/2020 — 03/15/2021 9/16/2020	Policy state/status: CA/Created

Policy

- o Change address

Drivers

- o Add driver
- o Change driver
- o Delete driver
- o Add/Edit Excluded Drivers

Vehicles

- o Add vehicle
- o Change vehicle
- o Delete vehicle

Coverages

- o Change coverages

Endorsement effective date: 09/16/2020

SAVE ENDORSEMENT EFFECTIVE DATE DISCARD & RETURN



BRIDGER

LIMITS SCREEN

The **Limits** shown will be the **Limits** the insured currently has on their policy.

If the insured wishes to change their **Coverage(s)**, you may make those changes now.

****Screenshots below show removal of MED, UMBI/UMPD and OTC/COLL****

Once all changes have been entered, click the **RATE AND NEXT** button.

If no changes to **Limits** are desired, click the **RATE AND NEXT** button.

LIMITS

Limits	Policy Limits	2015/Ford/FIESTA
BI: *	<input type="text" value="\$15,000/\$30,000"/>	
PD: *	<input type="text" value="\$10,000"/>	
MEDPM:	<input type="text" value="\$1,000"/>	
UMBI:	<input type="text" value="\$15,000/\$30,000"/>	
UMPD/CDW:	<input type="text" value="\$3,500 or CDW"/>	
Other than Collision:		<input type="text" value="\$1,000"/>
Collision:		<input type="text" value="\$1,000"/>

LIMITS

DISCARD & RETURN

SAVE & EXIT

BACK

RATE AND NEXT

Limits	Policy Limits	2015/Ford/FIESTA
BI: *	<input type="text" value="\$15,000/\$30,000"/>	
PD: *	<input type="text" value="\$10,000"/>	
MEDPM:	<input type="text" value="None"/>	
UMBI:	<input type="text" value="None"/>	
UMPD/CDW:	<input type="text" value="None"/>	
Other than Collision:		<input type="text" value="None"/>
Collision:		<input type="text" value="None"/>

Coverages were removed



BRIDGER

QUOTE SCREEN

This page will show:

Additional / Return Premium, Installment Change, Endorsement Total, Summary of Changes, Coverage Summary, Current and New Premium.

If the insured agrees with the **New Premium** and wishes to process the **Endorsement**, click the **NEXT** button.

If the insured **DOES NOT** want to proceed with the changes, click **SAVE & EXIT** button.

Be sure to advise the insured that the changes have not been processed or bound.

QUOTE

[Driver's points](#) [Html trace for Incline National Insurance Company](#) [Xml trace for Incline National Insurance Company](#)

DISCARD & RETURN

SAVE & EXIT

← BACK

NEXT →

Available Payment Options			
Payment Method	AP/RP	Installment	Endorsement Total
16.66% Down-5 Installment	(\$424.42)	(\$162.31)	(\$419.42)

Coverages summary		
Coverages	Policy Limits	Ford/2015 EV
BI	\$15,000/\$30,000	\$96.00
PD	\$10,000	\$86.00
Vehicles Total		\$182.00
Policy Total		\$182.00

Current Policy Premium before Change	\$642.00
New Policy Premium after Change	\$182.00
Pro Rate Factor	0.923
Prorated Policy Premium Difference	(\$424.42)
Endorsement Fee:	\$5.00
Endorsement Total:	(\$419.42)



BRIDGER

BINDING SCREEN

This screen provides a **Premium Summary** of the requested changes.

The system will determine if any **Down Payment** is due as a result of the transactions.

If money is due, select the **Payment Method** in the drop-down field and input the **Payment Information**.

You can check the box on the left to pre-populate the insured's existing policy information.

The **Cardholder Agreement Box** at the bottom of the screen must also be checked.

Click the **BIND ENDORSEMENT** button to complete the endorsement process.

BINDING

DISCARD & RETURNSAVE & EXITBIND ENDORSEMENTBACK

Current Policy Premium before Change:	\$751.00
New Policy Premium after Change:	\$1,079.00
Prorated Policy Premium Difference:	\$326.19
Endorsement Fee	\$5.00
Total:	\$331.19

Down Payment Amount: \$57.55

Down Payment Method *

Insured Credit/Debit Card

☒ Check Here if you would like to use the same Name & Address info as the Applicant!

Cardholder First Name *

Cardholder Last Name *

Address 1 *

Address 2

City *

State *

Zip *

Credit Card Type *

Credit Card Number *

Expiration Date *

STEVE

MINSTER

6011 SUN VIEW RD

YORBA LINDA

California

92886

Visa

4111111111111111

January

2021

Cardholder agrees that their credit card will be charged for the Down Payment Amount shown above. I agree ☒

Payment method



BRIDGER

POLICY DETAILS SCREEN

This screen allows the **Broker / CSR** to email the new **Policy Documents** (*ID CARD - Declaration Page - Applicable Forms*) to the customer. **CONFIRM** the **Insured's Email Address** prior to emailing documents, then click the **SEND** button. The **Endorsement Transaction** is now complete.

Policy Detail [Print](#)

Insured Name/DBA	Elena Test	Effective date	09/01/2020
Policy ID	DM_IN_CA000002-00	Expiration date	03/01/2021
Policy Status	In-Force	Duration	Months/6 month(s)
		Payment plan	16.66% Down-5 Installment
Suspense/Diary: None		Policy total + Fees	\$249.00

Basic Documents and Packages

[Click Here](#) to go to the Policy History page where you can view all documents associated with each policy transaction.

Email the Policy Documents and Policy Attachments

To:

CC:

From:

Subject:



Confirm insured email address



CSR email address

Dear Elena Test,
Below is a link to your insurance Policy Documents!

[Send](#)

Virtual Time: 9/14/2020 2:00



BRIDGER

Bridger Insurance Services Broker Relations Department

Phone #: (925) 800-7442

E-Mail: BrokerRelations@BridgerIns.com



BRIDGER

Bridger Insurance Services FNOL - First Notice of Loss

Online Claim Reporting

<http://BridgerClaim.com/Claim>

Phone #: (855) 543-0099

E-Mail: ExistingClaims@BridgerIns.com